

Fellowship Assurance Form End User Guide

OnBase Web Client

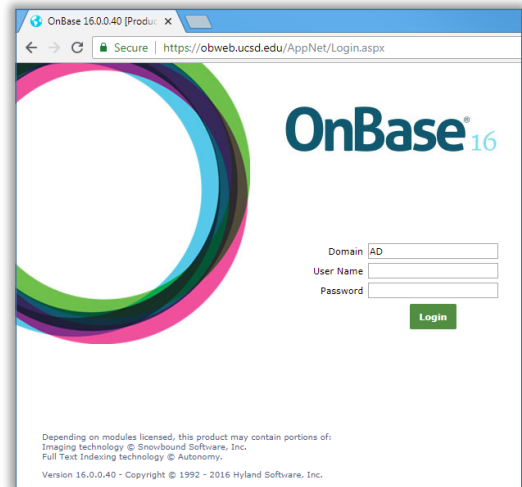
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Logging into OnBase Web Client

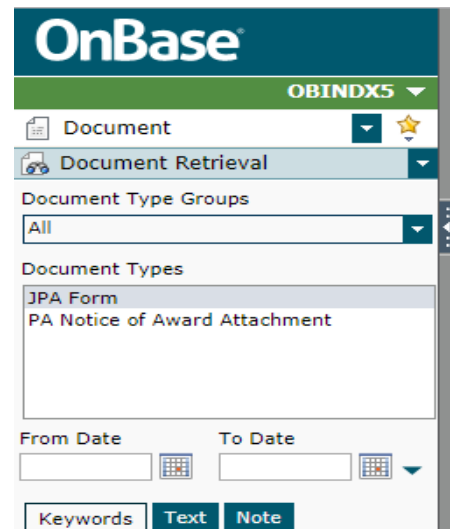
1. Enter this URL into your browser of choice:
<https://obweb.ucsd.edu/AppNet/Login.aspx>
2. Using your Active Directory (AD) credentials to log into OnBase
3. AD Username defaults to ALL CAPS (make sure CAPS lock is off)
AD Password remains case sensitive

NOTE: Refer to UC San Diego Form Assistance/Support contact page (page 19) for any access issues.



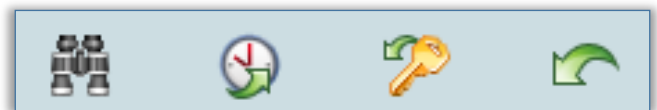
Landing Page after successful Login

1. Username dropdown (green) will be the first dropdown
2. Document will be the default value in the second dropdown
3. Document Retrieval will be the default value in the third dropdown
4. List of available Document Types for retrieval will be listed
5. Date range for retrieval is available (not required)



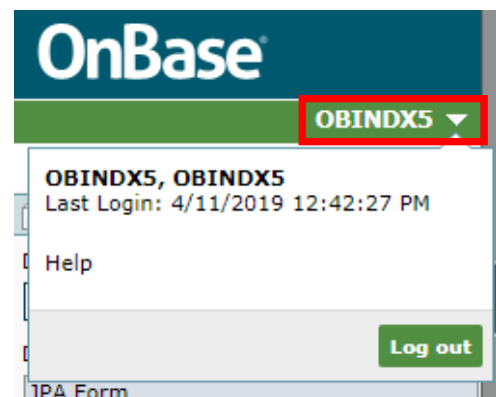
Web Client Icons

1. The binocular icon will retrieve documents based on the keyword(s) a user enters
2. The clock with green arrow icon will display query history, listing all previous queries for the logged in user
3. The key with green arrow icon will clear any keywords previously entered



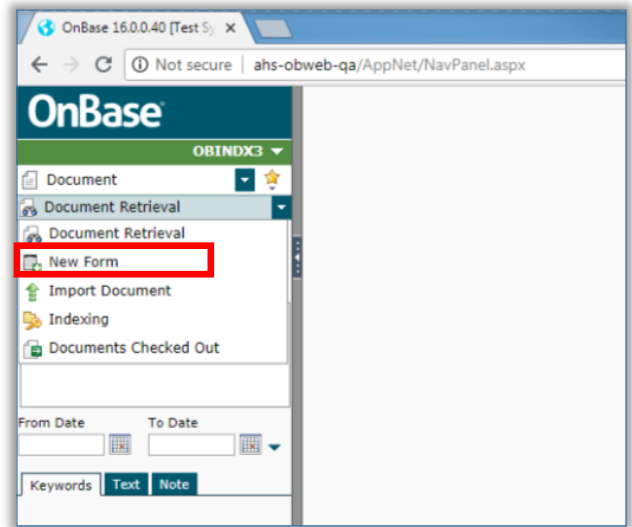
Logging out of OnBase Web Client

1. Click on dropdown arrow next to username
2. Click on Logout
3. OnBase Web Client currently has a time out setting for 2 hours. After 2 hours of no activity, user will be automatically logged out of Web Client



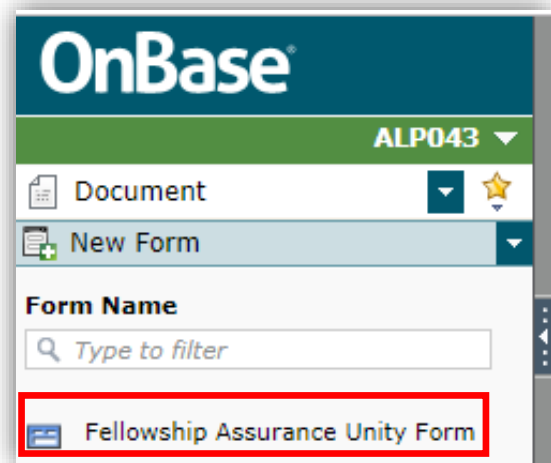
Creating/Submitting a new Fellowship Assurance Form

1. In left margin, click on 2nd dropdown menu that has 'Document Retrieval' as the default option
2. Select 'New Form' option
3. Click on **New Form** to launch new form.



Selecting new Fellowship Assurance Form

1. Click on **Fellowship Assurance Form** to launch new form
2. Fellowship Assurance Form will display on right hand side



Fellowship Assurance Form

A screenshot of the Fellowship Assurance Form interface. The 'New Form' window is open, showing a list of forms on the left. The 'Fellowship Assurance Unity Form' is selected. The main content area shows the 'Summary and Signature' tab. The form title is 'NRSA Individual Fellowship'. Below the title, there is a list of applicants: 1. Health Sciences Post-Doctoral Fellows (F32) and 2. Health Science Professional Degree Pre-Doctoral Fellows (M.D. or Pharm.D applicants or dual degree applicants (M.D./ Ph.D. and Pharm.D./ Ph.D.)) (F30). An 'Instruction' section follows, stating that NIH NRSA fellowship applications are electronic and must be submitted to NIH in ASSIST, by an authorized institutional signing official. Below the instruction, there are three optional sections: 'eRA Account (Optional)', 'ePD Number (Optional)', and 'ASSIST Number (Optional)'. Each section has a question and a corresponding input field. The 'eRA Account' section also includes a 'User name' field and a note about assistance. The 'ePD Number' section includes a 'Lookup' button and a 'Reset ePD entry' button. The 'ASSIST Number' section includes an 'ASSIST #' field. The 'FOA Number (Optional)' section includes a 'FOA #' field.

Instruction

NIH NRSA fellowship applications are electronic and must be submitted to NIH in ASSIST, by an authorized institutional signing official. To submit an application to the NIH, the applicant must be affiliated with UC San Diego in eRA Commons and have the PI role.

eRA Account (Optional)

** Do you currently have an active eRA Commons account?

User name:

If you need assistance with an eRA Common account, please contact Nicole Foshey at nfoshey@ucsd.edu.

ePD Number (Optional)

** Do you know what your ePD# is?

ePD #:

[Reset ePD entry](#)

ASSIST Number (Optional)

** Do you know what your ASSIST # is ?

ASSIST #:

FOA Number (Optional)

** Do you know what your FOA# is?

FOA #:

Optional Fields

1. eRA Commons Account, ePD number, ASSIST number, and FOA number are optional fields.
2. Enter these fields if available.

ePD Lookup

1. Enter ePD number in ePD # field.
2. Click tab on your keyboard.
3. The following fields will auto-fill once tab button is clicked:
 - Applicant Full Name
 - Applicant Home Department Code
 - UC San Diego Fund Manager Name
 - UC San Diego Fund Manager Email
 - Project Title
 - Proposal Deadline
 - ePD status
 - Type of proposal
4. To reset entry, click 'Reset ePD entry' and this will clear off the above fields.

Check here if the applicant is not a UC San Diego employee.

Applicant	
Applicant Full Name (Last Name, First Name): SPITZER, NICHOLAS CANADAY	Applicant Home Department Code: 000604
Applicant Email: <input type="text"/>	Applicant Title: <input type="text"/>
<input type="button" value="Lookup"/>	Applicant Phone#: <input type="text"/>

Main Section: Applicant

1. Enter applicant last name in 'Applicant Full Name' textbox.
2. Click on 'Lookup' button and it will autofill the following fields:
 - 'Applicant Email'
 - 'Applicant Home Department Code'
 - 'Applicant Title'
 - 'Applicant Phone#'
3. Ensure the validity of the email address and overwrite when needed.
4. Check 'check here if the applicant is not a UC San Diego employee' box and manually enter applicant information.

UC San Diego Fund Manager	
UC San Diego FM Full Name (Last Name, First Name):* HENDRY	UC San Diego Fund Manager Email:* <input type="text"/>
<input type="button" value="Lookup"/>	

Main Section: UC San Diego Fund Manager

1. Enter fund manager last name in 'UC San Diego Fund Manager Full Name'
2. Click on 'Lookup' button and it will autofill 'UC San Diego Fund Manager email'.
3. Required fields are 'UC San Diego Fund Manager Full Name' and 'UC San Diego Fund Manager email'.

UC San Diego Sponsor

UC San Diego Sponsor is a designated individual responsible for providing the fellow (applicant) with research training and career guidance throughout the grant award period.

Sponsor Full Name (Last Name, First Name):*

Sponsor Email:*

Lookup

Sponsor Home Department Code:

Sponsor Title:

Sponsor Phone #:

Main Section: UC San Diego Sponsor

1. Enter UC San Diego Sponsor's last name in 'Sponsor Full Name' textbox.
2. Click on 'Lookup' button and it will autofill the following fields:
 - 'Sponsor Email'
 - 'Sponsor Home Department Code'
 - 'Sponsor Title'
 - 'Sponsor Phone#'
3. Required fields are 'Sponsor Full Name' and 'Sponsor Email'.

Co-Sponsor

Co-Sponsor

Co-Sponsor Full Name (Last Name, First Name):*

Co-Sponsor Email:*

Lookup

NOTE: If you have more than 2 Co-Sponsors, please let HS SPPO know.

Main Section: Co-Sponsors (Co-Sponsor 1)

1. To add a Co-Sponsor, check the 'Co-Sponsor' checkbox and this will bring up Co-Sponsor section.

Co-Sponsor

Co-Sponsor

Co-Sponsor Full Name (Last Name, First Name):*

Lookup

NOTE: If you have more than 2 Co-Sponsors, please let HS SPPO know.

Add Another Co-Sponsor

Main Section: Co-Sponsors (Co-Sponsor 2)

1. Up to 2 co-sponsors can be added in the form. If 2 co-sponsors are needed, after clicking Co-Sponsor checkbox, click 'Add Another Co-Sponsor' checkbox.

NOTE: If there are more than 2 co-sponsors, please contact Nicole Ketchum at nketchum@health.ucsd.edu).

UC San Diego Department Chair

UCSD Dept Chair Full Name (Last Name, First Name): <input type="text"/>	UCSD Dept Chair Home Department Code: <input type="text"/>
UCSD Dept Chair Email: <input type="text"/>	UCSD Dept Chair Title: <input type="text"/>
<input type="button" value="Lookup"/>	UCSD Dept Chair Phone #: <input type="text"/>

Main Section: UC San Diego Department Chair

1. Enter UC San Diego Department Chair's last name in 'UC San Diego Department Chair Full Name' textbox.
2. Click on 'Lookup' button and it will autofill the following fields:
 - 'UC San Diego Department Chair Email'.
 - 'UC San Diego Department Chair Home Department Code'.
 - 'UC San Diego Department Chair Title'.
 - 'UC San Diego Department Chair Phone#'.
3. Required fields are 'UC San Diego Department Chair Full Name' and 'UC San Diego Department Chair Email'.

Proposal Details

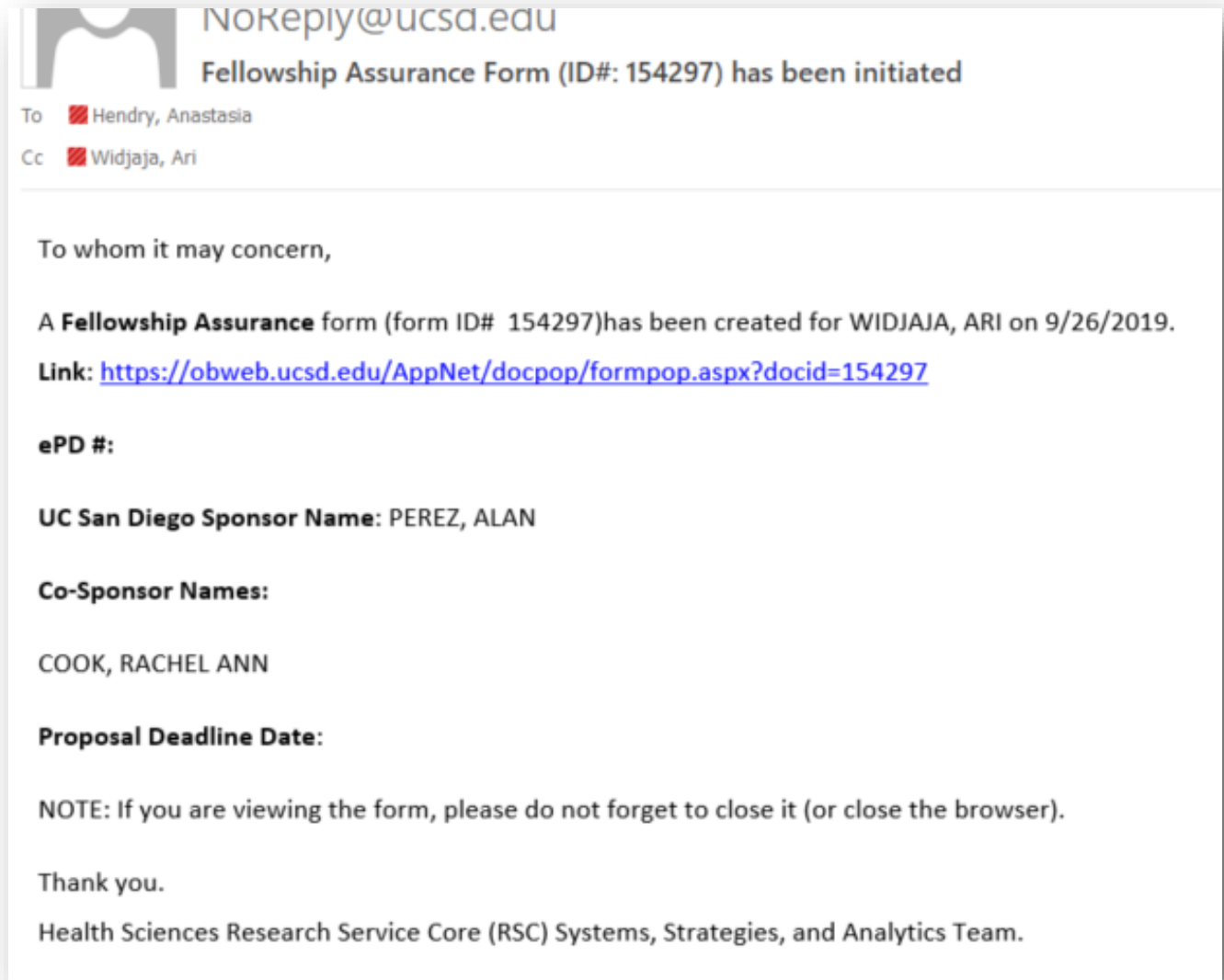
Project Title: <input type="text" value="Project ABC"/>	Proposal Deadline Date <input type="text" value="9/25/2019"/>
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Main Section: Project Title and Proposal Deadline Date

1. Enter project title in 'Project Title' textbox.
2. Enter proposal deadline date in 'Proposal Deadline Date' textbox.

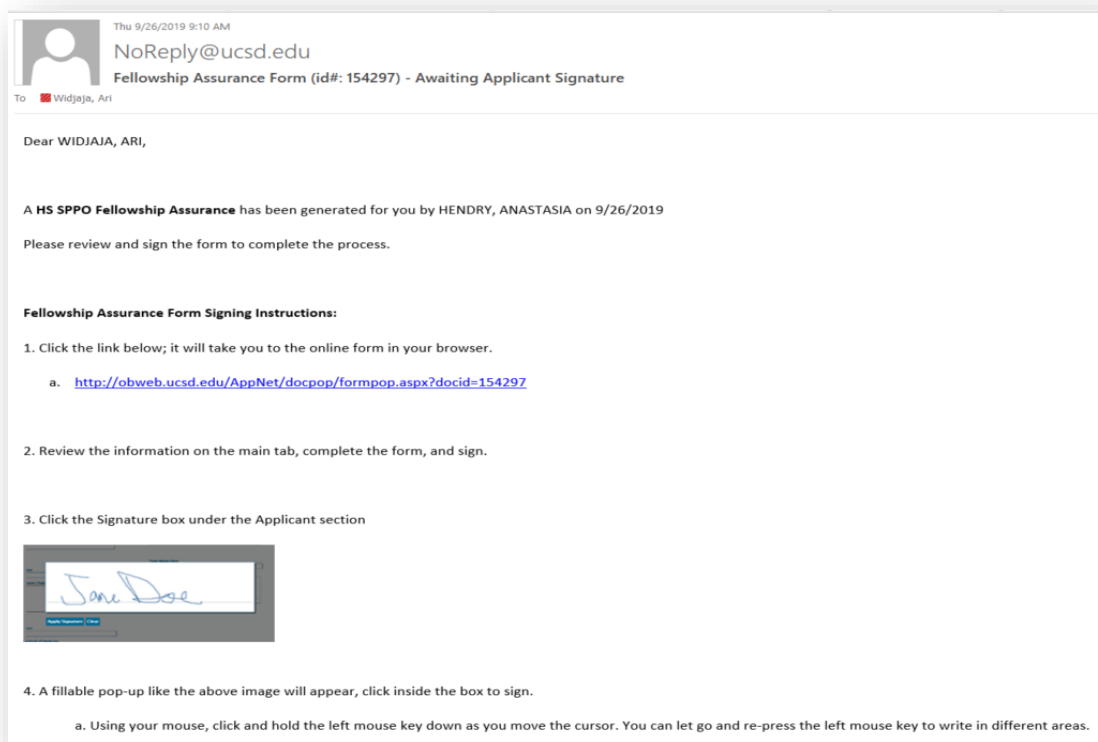
Initial Notification to UC San Diego Fund Manager and HS SPPO Analyst.

1. After successful submission of the Fellowship Assurance form, the UC San Diego fund manager and HS SPPO Analyst (Nicole Ketchum) will receive an email notification.
2. Email notification example below:



Notification to Applicant and task.

1. Applicant will receive an email notification prompting them to review and complete the form.
2. Applicant is required to complete the following actions:
 - *Review the form.
 - *Electronically sign the form in Applicant signature section in the main page.
 - *Click **SUBMIT**.
 - *Close the browser page or tab that is displaying the form.
3. Submitting the form will route to the UC San Diego Sponsor.



Signature

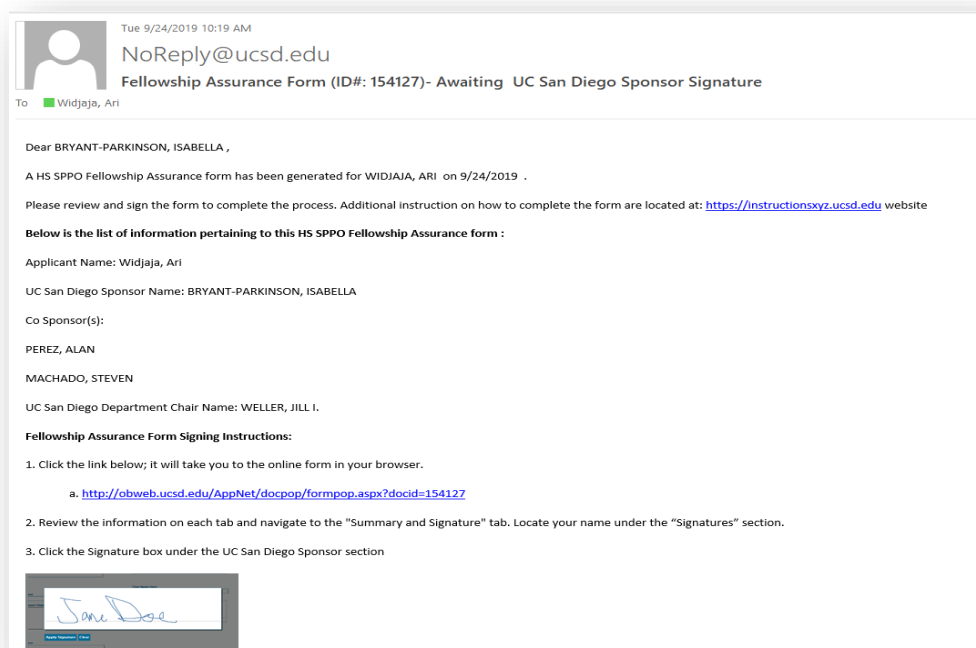
NOTE: Unless you are the applicant, do not sign this form.

Applicant Name:

We the undersigned certify (1) that the information submitted within this application is true, complete and accurate to the best of the Fellow's and Sponsor's knowledge; (2) that any false, fictitious, or fraudulent statements or claims may subject the Fellow and Sponsor(s) to criminal, civil, or administrative penalties; (3) that the Sponsor(s) will provide appropriate training, adequate facilities, and supervision if a fellowship is awarded as a result of the application; (4) that the Fellow has read the Ruth L. Kirschstein National Research Service Award Payback Assurance and will abide by the Assurance if an award is made, and that the award will not support residency training; and (5) that the applicant is not delinquent in repaying any federal debt.

Notification to UC San Diego Sponsor and task.

1. UC San Diego Sponsor will receive an email notification prompting them to review and complete the form.
2. UC San Diego Sponsor is required to complete the following actions:
 - *Review the form.
 - *Electronically sign the form in UC San Diego Sponsor signature section in the signature page.
 - *Click **SUBMIT**.
 - *Close the browser page or tab that is displaying the form.
3. Submitting the form will route to the Co-Sponsor(s) if applicable, or otherwise to UC San Diego Department Chair.



Signature

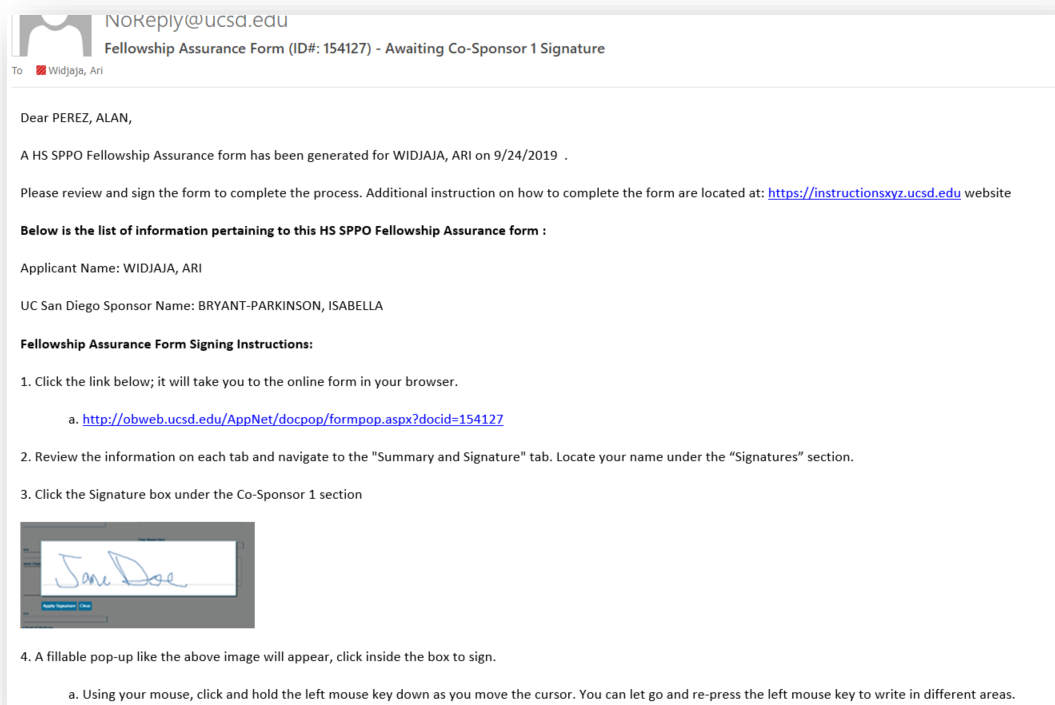
We the undersigned certify (1) that the information submitted within this application is true, complete and accurate to the best of the Fellow and Sponsor(s) to criminal, civil, or administrative penalties; (2) that the Sponsor(s) will provide appropriate training, adequate facilities, and Kirschstein National Research Service Award Payback Assurance and will abide by the Assurance if an award is made, and that the award will

UC San Diego Sponsor

Name:

Notification to Co-Sponsor(s) * and task.

1. When selected, Co-Sponsor(s) will receive an email notification prompting them to review and complete the form.
 2. Assigned Co-Sponsor(s) is/are required to complete the following actions:
 - *Review the form.
 - *Electronically sign the form in Co-Sponsor signature section in the signature page.
 - *Click **SUBMIT**.
 - *Close the browser page or tab that is displaying the form.
 3. Submitting the form will route to the UC San Diego department chair.
- * Only when Co-Sponsor(s) is selected.*



The screenshot shows the "Signature" section of the form. It includes a disclaimer: "We the undersigned certify (1) that the information submitted within this application is true, complete and accurate to the best of the Fellow's and Sponsor's knowledge; (2) that any false, fictitious, or fraudulent statement, or omission of any material fact on this application will constitute grounds for denial; (3) that the Fellow has read and understands the terms, conditions, and requirements of the award; (4) that the Fellow has read the Ruth L. Kirschstein National Research Service Award Payback Assurance and will abide by the Assu...".

UC San Diego Sponsor

Name: PEREZ, ALAN

[Handwritten signature of Alan Perez]

Submit

Co-Sponsor 1

Name: COOK, RACHEL ANN

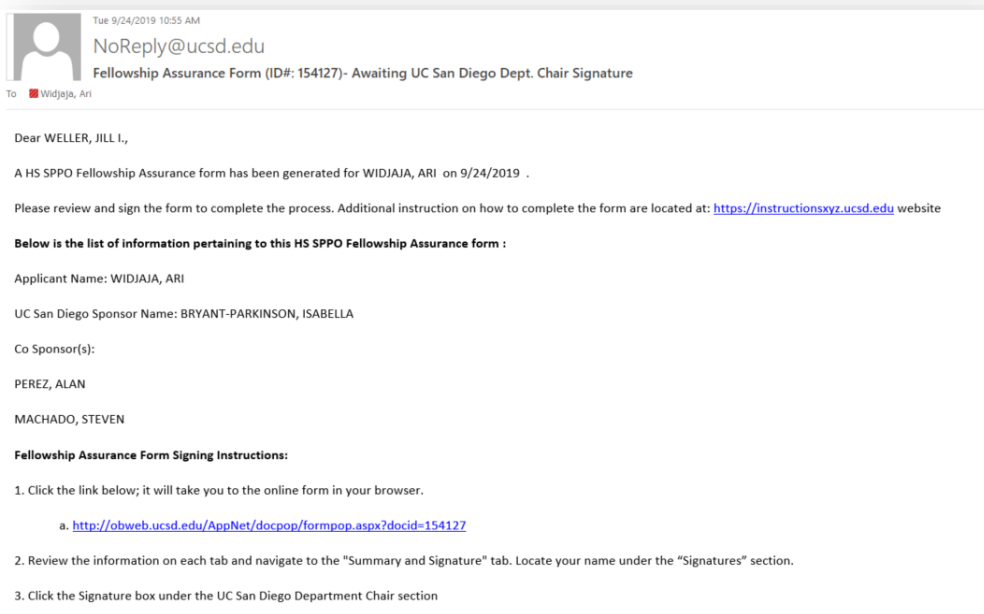
[Handwritten signature of Rachel Ann Cook]

Submit

The Co-Sponsor 1 section is highlighted with a red border.

Notification to UC San Diego Department Chair and task.

1. UC San Diego Department Chair will receive an email notification prompting them to review and complete the form.
2. UC San Diego Department Chair is required to complete the following actions:
 - *Review the form.
 - *Electronically sign the form in UC San Diego Department Chair signature section in the signature page.
 - *Click **SUBMIT**.
 - *Close the browser page or tab that is displaying the form.
3. Once the form is submitted, an email notification will be sent to the appropriate fund manager and HS SPPO Analyst.



The screenshot shows the 'Signature' section of the form. It contains three signature boxes, each with a 'Submit' button below it. The first box is for the 'UC San Diego Sponsor' (Name: PEREZ, ALAN) and contains a handwritten signature. The second box is for 'Co-Sponsor 1' (Name: COOK, RACHEL ANN) and also contains a handwritten signature. The third box is for the 'UC San Diego Department Chair' (Name: MACHADO, STEVEN) and contains a blue button labeled 'Click to Sign Document'.

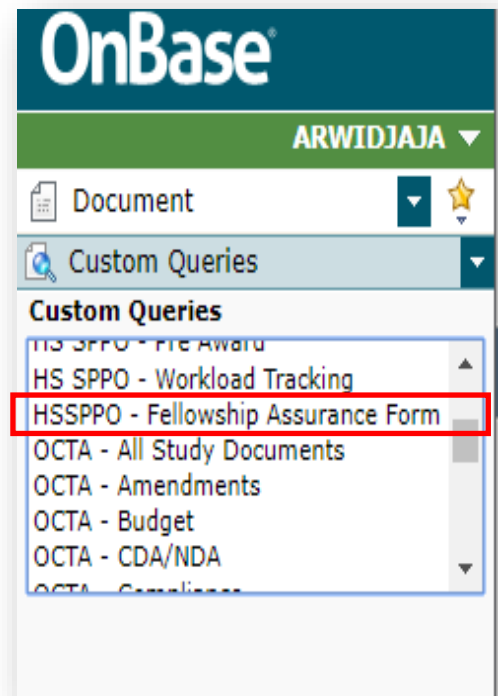
Retrieve a Completed Fellowship Assurance Form

1. In left margin, click on 2nd dropdown menu that has 'Document Retrieval' as the default option.
2. Select 'Document Retrieval' option.
3. Select 'HS SPPO Review Process' in Document Type Groups then select 'HS SPPO Fellowship Assurance Form'.
4. Enter keywords to retrieve the "Fellowship Assurance Form" by (recommended keywords include date range, Fund Manager, or Fellowship - Applicant Full Name).

The screenshot displays the OnBase interface. At the top, the 'OnBase' logo is visible. Below it, the user's name 'ARWIDJAJA' is shown with a dropdown arrow. The main navigation area includes a 'Document' dropdown menu and a 'Document Retrieval' dropdown menu. Under 'Document Retrieval', there are sections for 'Document Type Groups' and 'Document Types'. The 'Document Type Groups' section shows 'HS SPPO Review Process' selected. The 'Document Types' section lists several options, including '01-PRE-HS SPPO Proposal Record Form (U', '01-PRE-HS SPPO Submission Review Form', and 'HS SPPO Fellowship Assurance Form'. Below these sections, there are 'From Date' and 'To Date' input fields with calendar icons. A 'Keywords' section is active, showing a list of search terms with corresponding input fields. The keywords listed are: 'Fellowship - Applicant E...', 'Fellowship - Applicant F...', 'WIDJAJA *', 'Fellowship - Applicant F...', 'Fellowship - Applicant H...', 'Fellowship - Applicant ID', '(000000000)', 'Fellowship - Applicant L...', 'Fellowship - Applicant N...', 'Fellowship - Applicant P...', '((000)000-0000)', 'Fellowship - Applicant T...', 'Fellowship - Sponsor E...', 'Fellowship - Sponsor Fir...', and 'Fellowship - Sponsor Fu...'. At the bottom of the interface, there are several icons for navigation and search.

Custom Queries

1. Select the Custom Queries option from the third dropdown menu
2. Select specific Custom Query you want to use
3. Optional: Enter From Date and To Date
4. Enter keyword to query documents by (Employee Name, UCSD Project Number, Grant Number)
 - A. If using 'Fellowship - Applicant Full Name', 'Fellowship - Fund Manager Full Name', or 'Fellowship - Sponsor Full Name' keyword to retrieve your document by, please enter asterisk before and after value (i.e. *SMITH*)
5. Press enter twice on your keyboard or Click on Binoculars icon to retrieve documents
6. Custom Query results will display on right hand side of browser window
7. PDF documents will display in lower right hand side of the browser window

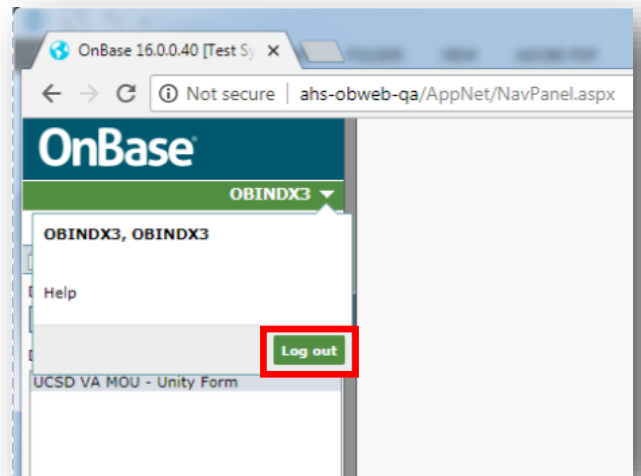
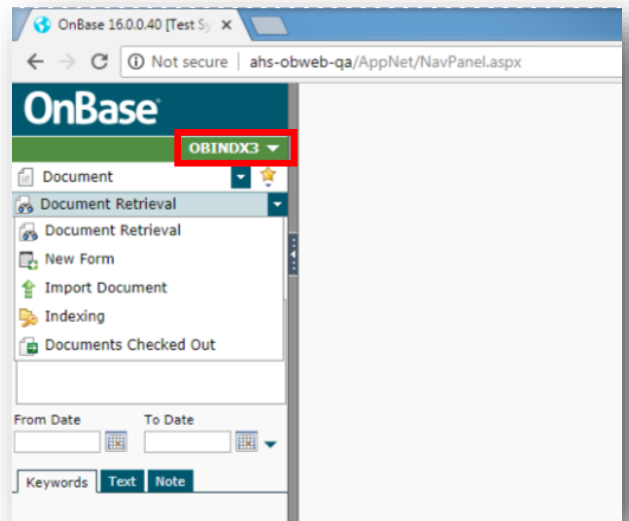


Fellowship Assurance Form Custom Query

OnBase									
Drag a column here to group by.									
Form ID# (3)	ePD #	Applicant	Applicant Email Address	UC SD Sponsor	UC SD Sponsor Email Address	Fund Manager	Fund Manager Email	Study Name	
154297		WIDJAJA, ARI	ARWIDJAJA@UCSD.EDU	PEREZ, ALAN	ARWIDJAJA@UCSD.EDU	HENDRY, ANASTASIA	ARWIDJAJA@UCSD.EDU	TESTING	
154127		WIDJAJA, ARI	ARWIDJAJA@UCSD.EDU	BRYANT-PARKINSON, ISABELLA	ARWIDJAJA@UCSD.EDU	HENDRY, ANASTASIA	ARWIDJAJA@UCSD.EDU	JUST A TEST	
153477		WIDJAJA, ARI	ARWIDJAJA@UCSD.EDU	BRYANT-PARKINSON, ISABELLA	ARWIDJAJA@UCSD.EDU	PEREZ, ALAN	ARWIDJAJA@UCSD.EDU	TEST 12	

Logging out of OnBase Web Client

1. In left side margin, click on first dropdown with your username
2. Click on Log Out



Fellowship Assurance Form Assignee Roles and Responsibilities

UC San Diego Fund Managers

1. Responsible for initiating the Fellowship Assurance form.
2. Assign Applicant, UC San Diego Sponsor, Co-Sponsor(s), UC San Diego Department Chair
3. Ensure all assigned contacts review and sign the form.
4. Provide a triage to void the form if needed.
5. Receives email confirmation in the initial and final process of the form.

Fellowship Assurance Applicant

1. Review and ensure accuracy of the form.
2. Sign the form.
3. Report any form data issues and/or questions to HS SPPO Analyst.

UC San Diego Sponsor, Co-Sponsors (Co-Sponsor 1 and 2), and UC San Diego Department Chair

1. Review and sign their designated section in Fellowship Assurance form.
2. Report any form data issues and/or questions to HS SPPO Analyst.

FAQs

What if I cannot log into OnBase Web Client?

Please see UC San Diego Form Assistance/Support contact page.

What if a signatory confirms data is incorrect?

Preparer will need to submit a new Fellowship Assurance form with correct data. Contact Nicole Ketchum (nketchum@health.ucsd.edu) to void the form.

Who do I contact for a status update on my Fellowship Assurance form?

Please email rschelp@ucsd.edu) with the following information: form ID number or the name of the applicant on the form.

Who do I contact if it appears a signatory did not sign correctly or close their browser after signing and submitting form?

Please see UC San Diego Form Assistance/Support or contact [Nicole Ketchum](#) (nketchum@health.ucsd.edu)

How to void a Fellowship Assurance form?

Please contact Nicole Ketchum (nketchum@health.ucsd.edu) or RSC staff (refer to UC San Diego Form Assistance/Support contact page).

Where do I send form feedback and suggestions?

Please see UC San Diego Form Assistance/Support contact page.

UC San Diego Form Assistance/Support

If you need assistance or support with a form or the process, please contact the following:

VCHS Research Service Core

rschelp@ucsd.edu

Nicole Ketchum (nketchum@health.ucsd.edu) HS SPPO Analyst - Fellowship Assurance form specialist